Issue Tracking guide

Purpose

This tool contains guidelines for tracking and resolving issues using an issue log.
Using the Issue Log Template

The following instructions provide details about how to use each of the columns in the Issue Log Template tool.

Standard Issue Log Columns

- Issue Number: Number the issues sequentially as they are identified. The number is not used to represent priority, but rather as a reference to avoid confusion regarding which issue is being discussed (e.g., "Regarding issue #5, we need to…").
- Issue Description: Provide a description of the issue. Be as descriptive as possible, while still being relatively brief. Other team members should be able to understand the issue by reading the description, even if their specific responsibilities on the Project Team do not provide them with the context. Caution: Vague descriptions will allow another team member to make an improper assumption.
- Issue Priority: At the beginning of the project, determine the priority scale that the Project Team will use in the Issue Log. During the course of the project, ensure that the highest priority issues are resolved quickly. Examples of priority scales include:
  - High, medium, low
  - 1 to 5, with 1 being highest priority and 5 being lowest
- Issue Originator: Indicate the Project Team (both the implementation team and the customer) member who raises the issue. In most cases, this will be an implementation Team member, but the Project Team may also include customer Team members depending on the scope of the project.
- Date Identified: Document the date that the issue is first raised.
- Date to be Resolved by: Document the target date for resolving the issue. This date may be changed as additional details surrounding the issue are identified. The Project Manager must approve any changes if a date is pushed further out. Approval is not required if the issue is resolved before the target date.
- Project Implementation Team Issue Owner: Indicate the Implementation Project Team member responsible for achieving resolution of the issue. Even in instances when a Customer Issue Owner is identified and takes ownership for the steps to achieve resolution, an implementation owner should still be assigned to ensure that resolution is achieved.

- <u>Customer Issue Owner</u>: Indicate the Customer Team member responsible for achieving resolution. In instances when all responsibility for resolution resides with the implementation Project Team, leave this column blank.
- <u>Issue Solution</u>: Provide a description of the resolution that is achieved. Include specific names when appropriate, and the actual date of resolution, especially if it differs from the date noted in the *Date to be Resolved by* column.

Potential Issue Log Column Customizations

The following are fairly typical column customizations that have been used by Project Teams in the past.

- <u>Date Resolved</u>: Some Project Teams have added this column after the *Date to be Resolved by* column. This is especially helpful with larger Issue Logs, so that the reader does not need to look through the *Issue Solution* column to locate the resolution date.
- <u>Procedure Name/Number</u>: This column is helpful in Procedure Development projects. When used, it is often added after the *Issue Number* column. The purpose is to be able to identify the procedure(s) impacted by the issue quickly. This allows issues to be sorted by procedure, and also highlights where potential changes need to be made to procedure deliverables once the issue is resolved.
- <u>Business Requirement Name/Number</u>: This column is helpful in Business Requirement Definition projects. It should be used in the same manner as the *Procedure Name/Number* column.

What to Do When an Issue is Closed

First, ensure that the issue is resolved. If the *Issue Solution* column contains any questions or recommended actions that have not been taken, this is an indication that the issue is not completely resolved and/or a new issue needs to be added to the Issue Log. Once an issue is completely resolved, it is helpful to visually depict that it is closed, which can be accomplished by shading the row containing the issue. **DO NOT** delete the row containing the resolved issue. Maintaining a historical record of issues and associated resolutions is very important.